

SOAR Online Course: Child Curriculum

Practice Case Medical Summary Report (MSR)

Writing Tips from the SAMHSA SOAR TA Center

The goal of this activity in the SOAR Online Course is to make sure you understand the basic concepts of writing an MSR. We understand that this may be your first time completing an MSR, so we do not expect perfection. Because the Disability Examiner will never meet the child in person, it is critical to “paint the picture” of the child’s life, symptoms, and limitations in functioning.

Getting Started and Gathering Information

Review all of the information provided about your child applicant in the case study materials

- Gather information from all videos, progress notes, treatment and education records provided
- Remember that information is dispersed throughout the Practice Case in Classes 1-5, simulating how you will receive information in real cases (bit-by-bit over time)
- As you gather information about the child, add to the related sections in the MSR template. This will help prevent you from duplicating your work
- Throughout the MSR, focus on making a connection between the child’s symptoms and limitations in functioning as they compare to a child of the same age who does not have physical or mental impairments

Formatting your MSR

- Use the MSR Template (*provided in Class 1: Meet Your Client and on the [SOAR Tools and Worksheets- Child SSI Applications](#) page of the SOARWorks Library*) to help organize your information
- Be sure to address every section. We are looking for complete paragraphs for each section of the report
 - Some sections, like Education and Functional Information, will require more than one paragraph to adequately address all pertinent details

Include Supporting Evidence

- Quotes from the child (as available), as well as family members, teachers, and case managers will help to strengthen your report
 - Including direct quotes is important for SSI applications, as it is more helpful for the disability examiner to read the evidence as directly reported from the child and those who know the child best, rather than paraphrasing their words
- Cite the sources and provide quotes from the records when discussing past treatment, as this helps Disability Determination Services (DDS) to easily locate the information you are referencing in the included records

Key Sections of the MSR

Reviewing Personal History

- Discuss developmental history and provide a brief overview of the child’s family background
- Discuss current and past living arrangements, including any foster care placements, and what led to the child experiencing homelessness

Documenting Educational Performance

- Discuss the child's performance compared to grade-level expectations
- Explain any extra help the student needs
 - Individualized Education Program (IEP)
 - Homework help
 - Special Education
- Provide clear links between the child's symptoms and functional limitations in school
- Quotes from a teacher or a support person will help to strengthen this section (utilize the IEP and SSA-5665 Teacher Questionnaire to obtain evidence)

Treatment Provider Records

- The child has received treatment from several providers. All of these providers should be cited at some point throughout your report.
 - Remember that records from school or IEPs may contain valuable information
- For each provider, briefly summarize why the child received treatment or a referral, the diagnoses the child received, the doctors or other specialists who performed testing or provided treatment, the child's medications, and any quotes from the records that help document symptoms or functional limitations
 - Explaining side effects of prescribed medications will further strengthen this area
- Remember to include quotes from the child, or people who know the child, about his or her symptoms in this section and throughout the MSR
- Since each child has both physical and psychiatric conditions, it is important to include summaries of all conditions
 - Reviewing the SSA listing criteria for epilepsy and asthma will be helpful in documenting physical health conditions for the SOAR Online Course practice case

Comprehensive Functional Information Section

This accounts for 50% of the SSA listing criteria. All **six** domains of functioning should be addressed for every MSR. Class 5 has great examples of functional descriptions!

- Write at least one long paragraph for each domain, providing multiple examples of the child's symptoms and limitations
- Clearly illustrate how symptoms of the child's conditions lead to limitations in functioning. (e.g., *Lauren has trouble controlling her emotions and reacts aggressively when asked to complete her daily chores. When the shelter director asked her to help set the tables for dinner, Lauren became so angry that she flipped over a table and ran out of the dining room screaming*)
- Include relevant quotes from the child, those who know the child best, and the records, when possible. Direct observations and examples from the clinical records will strengthen this section.

Review sample child SSI Application Packet: <https://soarworks.prainc.com/article/sample-soar-application-packet-child>